

Asset-Map[®]

Thornton

March 2017

Lead Advisor
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Household Member Inventory

People

Role	First Name	Last Name	Gender	DOB	Age
Primary	Lauren	Thornton	Female	11/10/1993 (est)	23 (est)
Spouse	Taylor	Dwyre	Male	12/12/1990 (est)	26 (est)
Dependent	Liam	Dwyre	Male	02/04/2015	2
Dependent	Rosalie	Dwyre	Female	12/25/2016	0

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Financial Inventory

Income

Type	Status	Interested Members	Reference Name	Income Source	Annual Amount	Data Collected	UM
Earned	Cur	• Taylor Dwyre (26e)	Part Time Job	Army Reserves	\$5,300	03/28/2017	N
Earned	Cur	• Lauren Thornton (23e)	Part Time Job	Partners in Parenting	\$5,230	03/28/2017	N
Earned	Cur	• Taylor Dwyre (26e)	Full Time Job	Syracuse City School District	\$30,000	03/21/2017	N
Earned	Cur	• Lauren Thornton (23e)	Part Time Job	Tully's Good Times	\$24,000	03/21/2017	N
Earned	Cur	• Taylor Dwyre (26e)	Part Time Job	Tully's Good Times	\$15,000	03/21/2017	N

Assets

Type	Status	Owner Members	Reference Name	Location	Value	Data Collected	UM
Non-Retirement	Cur	• Lauren Thornton (23e)	Savings	AmeriCu	\$11,350	03/28/2017	Y
Non-Retirement	Cur	• Lauren Thornton (23e)	Car	House	\$33,300	03/28/2017	Y
Non-Retirement	Cur	• Liam Dwyre (2)	Savings	House	\$4,590	03/28/2017	Y
Non-Retirement	Cur	• Taylor Dwyre (26e)	Savings	M&T	\$3,000	03/28/2017	N
Residence	Cur	• Taylor Dwyre (26e) - 50% • Lauren Thornton (23e) - 50%	Primary Residence	House	\$106,500	03/21/2017	N

Liabilities

Type	Status	Obligated Members	Reference Name	Lender	Debt Outstanding	Data Collected	UM
Line of Credit	Cur	• Lauren Thornton (23e)	Line of Credit	Chase	(\$1,200)	03/21/2017	N
School Loan	Cur	• Taylor Dwyre (26e)	School Loan	Bank	(\$7,350)	03/28/2017	N
School Loan	Cur	• Lauren Thornton (23e)	School Loan	Sallie Mae	(\$21,830)	03/21/2017	N

Insurances

Type	Exp	Insured Members	Reference Name	Insurance Provider	Benefit Amount	Data Collected	UM
Universal Life	Cur	• Taylor Dwyre (26e)	Life Insurance	Army	\$600,000	03/28/2017	N

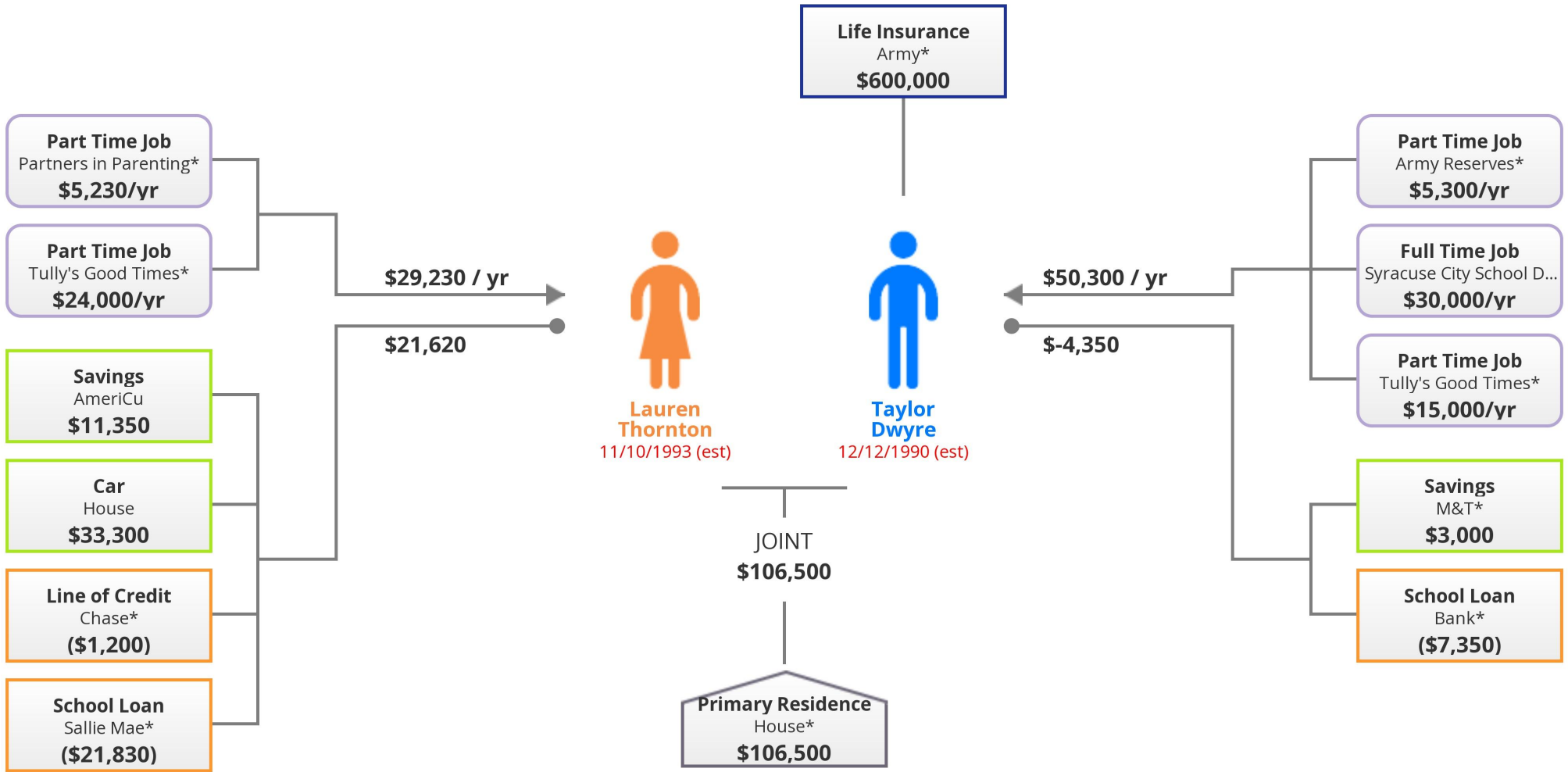
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 **Lauren Thornton (23e)**
Primary

 **Taylor Dwyre (26e)**
Spouse

 **Liam Dwyre (2)**
Dependent

 **Rosalie Dwyre (0)**
Dependent



 Income  Residence  Retirement Asset  Non-Retirement Asset  Liability  Insurance  Owned By Another  Deferred Annuity  Stencil

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